

# MBE/SBR LIAISON TRAINING

Presented by Governor's Office of Minority Affairs Staff



July 28, 2016 @GOMA

***Connect with us on social media***



# **AGENDA**

- 1. Welcome**
- 2. Governor's Office of Minority Affairs Staff**
- 3. GOMA Outreach Announcements**
- 4. MBE Forms Review**
- 5. MBE Reporting – MBE Compliance Manager, Lisa Sanford**
- 5. SBR Updates - Director MBE Compliance, Janice Montague**

# WELCOME

**Moderator:**  
**Lisa Sanford**  
**MBE Compliance Manager**



# GOMA OUTREACH

- Send event notices to [Eduardo.Hayden@maryland.gov](mailto:Eduardo.Hayden@maryland.gov)
  - We can cross promote and participate when necessary
  - Avoid Conflicts
- Ready, Set, GROW! Crownsville - August 25th, 10-1 pm
- First Lady Event! Women Business Owners, September 8th, 10-1 pm  
MAC Building in Glen Burnie  
(7001 Aviation Blvd).





# ANNOUNCEMENTS

# AGENCY DASHBOARD MEETINGS

- Discussing Past Performance
- FY17 Procurement Forecast
- FY17 MBE Strategic Plan
- FY17 SBR Strategic Plan







MARYLAND  
**OPEN**  
*for* Business



# THE CUSTOMER SERVICE PROMISE



CHANGING  
*Maryland*  
*for the Better*

- Friendly and Courteous
- Timely and Responsive
- Accurate and Consistent
- Accessible and Convenient
- Truthful and Transparent
- Resolution



# FOSTER CONNECTIONS

- Entertain One-on One Meetings and “Elevator Speeches” from vendors
- Avoid IT demos
- Pass along Capability Statements to Known Buyers
- Be Knowledgeable re: Agency Spend



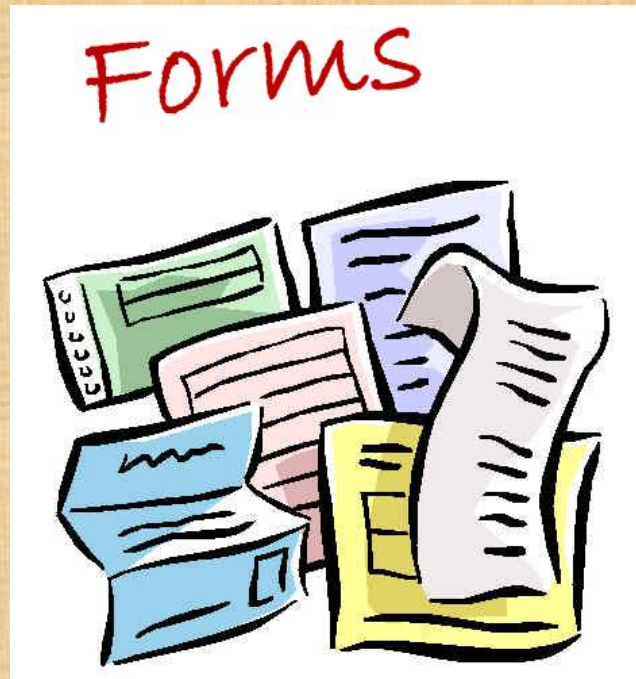
# COMPLIANCE REVIEWS



**COMING  
SOON!**

# TECHNICAL TRAINING

## MBE FORMS



# MBE FORMS

## **MBE Forms Review – MBE Liaison Participation**

- Liaison should participate in review of all MBE-related forms received from bidders/offerors
- Review of bidder submissions – when in doubt a review and final decision should be a collaborative effort (liaison, AAG, and PO)
- COMAR 21.11.03.12 (Amending Participation Schedule); after award, must have prior written consent of MBE liaison to change Participation Schedule
- COMAR 21.11.03.12-1B (Commercially Useful Function); quality vs quantity participation
- Waiver review – should be a collaborative effort (liaison, AAG, PO and agency head); copy of written determination needs to come to GOMA

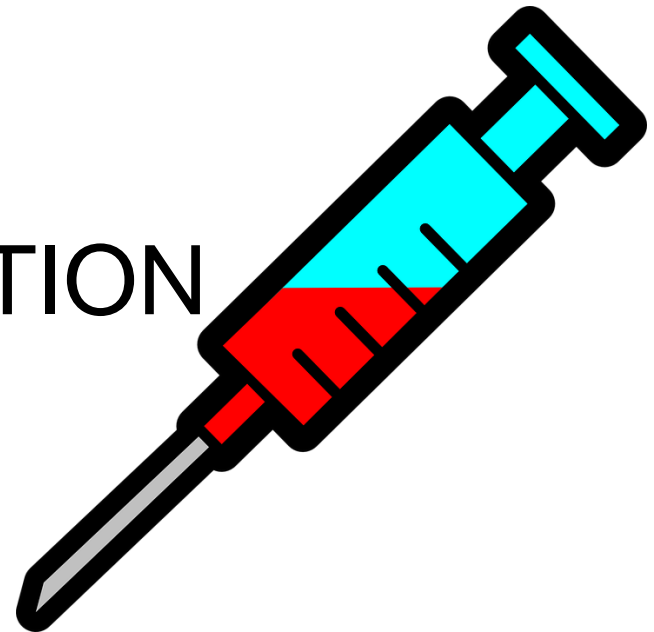
# MBE FORMS – FATAL ACTIONS

- FORMS NOT SUBMITTED
- 100% MBE SELF PERFORMANCE
- MBE IDENTIFIED IS NOT MDOT CERTIFIED
- <GOAL AND NO WAIVER



# MBE FORMS CUREABLE EXAMPLES

- MISSING SIGNATURES
- MBE CERTIFIED BUT NOT FOR WORK DESCRIBED
- TYPO OF CERTIFICATION NUMBER





# MBE FORMS GREY AREAS

**WHEN IN DOUBT**

**CONSULT WITH YOUR AG!**



# MBE Participation Schedule

## 4. MBE Participation Schedule

Set forth below are the (i) certified MBEs I intend to use, (ii) the percentage of the total Contract amount allocated to each MBE for this project and, (iii) the items of work each MBE will provide under the Contract. I have confirmed with the MDOT database that the MBE firms identified below (including any self-performing MBE prime firms) are performing work activities for which they are MDOT certified.

Prime Contractor	Project Description	Project/Contract Number

LIST INFORMATION FOR EACH CERTIFIED MBE FIRM YOU AGREE TO USE TO ACHIEVE THE MBE PARTICIPATION GOAL AND SUBGOALS, IF ANY. **MBE PRIMES:** PLEASE COMPLETE BOTH SECTIONS A AND B BELOW.

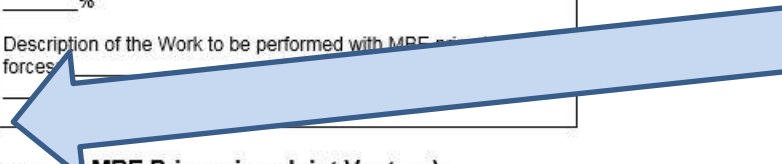
### SECTION A: For MBE Prime Contractors ONLY (including MBE Primes in a Joint Venture)

MBE Prime Firm Name: _____	Percentage of total Contract Value to be performed with own forces and counted towards the MBE overall participation goal (up to 50% of the overall goal): _____ %
MBE Certification Number: _____	Percentage of total Contract Value to be performed with own forces and counted towards the subgoal, if any, for my MBE classification (up to 100% of not more than one subgoal): _____ %
(If dually certified, check only one box.)	Description of the Work to be performed with MBE forces: _____
<input type="checkbox"/> African American-Owned	
<input type="checkbox"/> Hispanic American-Owned	
<input type="checkbox"/> Asian American-Owned	
<input type="checkbox"/> Women-Owned	
<input type="checkbox"/> Other MBE Classification	

### SECTION B: For all Contractors (including MBE Primes and MBE Primes in a Joint Venture)

MBE Firm Name: _____	Percentage of Total Contract to be performed by this MBE: _____ %
MBE Certification Number: _____	Description of the Work to be Performed: _____
(If dually certified, check only one box.)	
<input type="checkbox"/> African American-Owned	<input type="checkbox"/> Hispanic American-Owned
<input type="checkbox"/> Asian American-Owned	<input type="checkbox"/> Women-Owned

**Doublecheck Form to make sure it DOES NOT say MBE Prime in Section B!**



# WAIVERS

- COMAR 21.11.03.11D
- Refer to Waiver Guidance on GOMA website
- Identify
- Solicit
- Negotiate



# TECHNICAL TRAINING

## MBE REPORTING





# **MAJOR CHANGES in FY16/17**

- 1. New Deadlines**
- 2. New SBR Strategic Plan Format**
- 3. Revised Recurring Procurement Forecast**
- 4. Submission of 4<sup>th</sup> Quarter Report**
- 5. Form 3 Payment Web Portal**
- 6. New MBE Strategic Plan Format**
- 7. New Emphasis on MBE Contract Inventory**



**I'M SORRY,  
CAN WE  
BE FRIENDS  
AGAIN?**



# FORM 3 PAYMENT DATABASE

- Portal still under construction
- Testing Rollout about to begin
- Each Agency will have login and password
- Prepare your data
- Importing Agencies to receive instruction on 7/29/16



**LEA'S CAN BE DISMISSED**

**SEE YOU NEXT TIME**

# REMINDERS

- DGS DELEGATED CONTRACTS
- JUNE BPW AGENDA ITEMS
- DBM DELEGATED CONTRACTS
- CAPTURE MBE CREDIT CARD PAYMENTS



# DGS DELEGATED AWARDS

- **MANUAL ADJUSTMENT!**
- Please be mindful to include in awards on Form 1 & 2, the DGS Delegated Contracts (see excel document)!
- This is very important and collectively has a major impact



# BPW AGENDA ITEMS



- Please be **DOUBLE CHECK** and mindful to include in Form 1 & 2 Awards, the items from June 2016 BPW items that were **approved!** Check your records to make sure they were posted before June 30<sup>th</sup>... if not you must add them in manually
- This is very important and <sup>23</sup> collectively has a major impact



# Minority Business Enterprise (MBE) Information

## Full MBE Delegation

The following contracts have been fully delegated by DBM for MBE purposes. **Agencies are to report** both the award and the payments of agency Task Orders. Agencies are to report all MBE subcontractor participation and payments.

### Statewide Audit Services Contract

Contractors: Multiple

## Partial MBE Delegation

The following contracts have been partially delegated by DBM for MBE purposes. DBM has reported the award of these contracts; **using agencies are to report payments to prime contractor only.** DBM will report all MBE subcontractor participation and payments.

### Statewide Foreign Language Interpretation/Translation Services

Contractors: Language Line Services (Telephone), Ad Astra, Inc. (On-site), Schreiber Translations, Inc. (Written documents)

### Statewide Job Recruitment Advertising Services (Print Posting)

Contractor: The Baltimore Sun Company

### Statewide On-Line Job Postings and Employment Advertising Services

Contractors: Monster Worldwide, Inc. and Infosoft Group, Inc. dba MarylandJobNetwork.com

### State Medical Director and Occupational Medical Services for Maryland State Agencies

Contractor: Concentra Medical Centers

### Maintenance and Repair Services for State-Owned Vehicles

Contractor: PHH Arval, Inc. a.k.a. Element

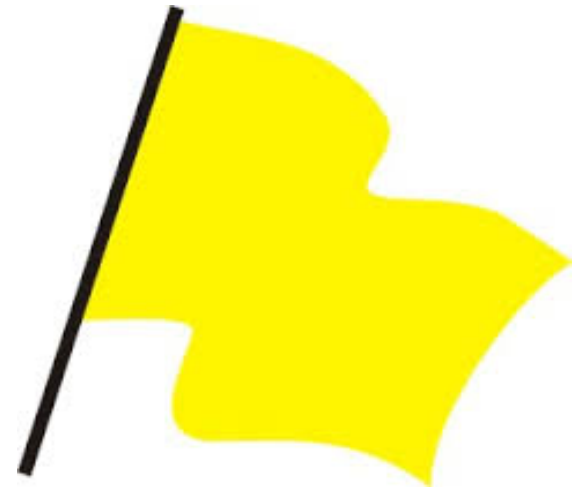
### Travel Management Services

Contractor: Globetrotter Travel Management Services

# MBEs NOT FLAGGED

- AJ STATIONERS
- APPLIED TECHNOLOGY
- SIGNS BY TOMORROW

The State can not correct this error so please make manual adjustments



# FORM 1 & 2 AWARDS

Minority Business Enterprise Annual Procurement Report											Reporting Form #1	
Reporting Department/Agency:												
Fiscal Year 2015												
Total Contract Awards by Procurement Categories												
Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-Prime & Sub	Total \$ of MBE Contracts Awarded-Prime & Sub	Total MBE Participation Percentage	
Architectural					0	\$0	0	\$0	0	\$0	0.00%	
Engineering					0	\$0	0	\$0	0	\$0	0.00%	
Construction					0	\$0	0	\$0	0	\$0	0.00%	
Construction Related Services					0	\$0	0	\$0	0	\$0	0.00%	
Maintenance					0	\$0	0	\$0	0	\$0	0.00%	
Services					0	\$0	0	\$0	0	\$0	0.00%	
Supplies & Equipment					0	\$0	0	\$0	0	\$0	0.00%	
IT Services					0	\$0	0	\$0	0	\$0	0.00%	
IT Supplies & Equipment					0	\$0	0	\$0	0	\$0	0.00%	
Human, Cultural, Social & Educational Services					0	\$0	0	\$0	0	\$0	0.00%	
Corporate Credit Card					0	\$0			0	\$0	0.00%	
Direct Voucher					0	\$0			0	\$0	0.00%	
<b>Totals</b>	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%	
Note(s):												
DENOMINATOR											NUMERATOR	
											MBE%	

Perform Quality Control: % should never be greater than 100%

# FORM 1 DATA SOURCES

## NUMERATOR

(MBE AWARDS detailed on FORM 2)

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## DENOMINATOR

(Agency's Total Reportable Awards FORM 1  
which includes MBE Prime and Sub Awards)

= MBE %

- ☐ New Awards and Option Renewals
- ☐ Change Orders
- ☐ Direct Vouchers and
- ☐ Credit Card Purchases

# **“LEAN AND CLEAN” AWARDS**

- PAY ATTENTION TO “WHAT’S IN AND WHAT’S OUT” (Numerator and Denominator)
- GRANTS – GREY AREA...UNDERSTAND WHAT IT IS
- BANK FEES ARE OUT
- STATEWIDE CONTRACTS ARE OUT (Numerator and Denominator)

# SBR WORK GROUP

- PENDING – Significant Changes to SBR Program (HB 788)



- Work Group Monthly Meetings
- Next Meeting August 2016



# SBR